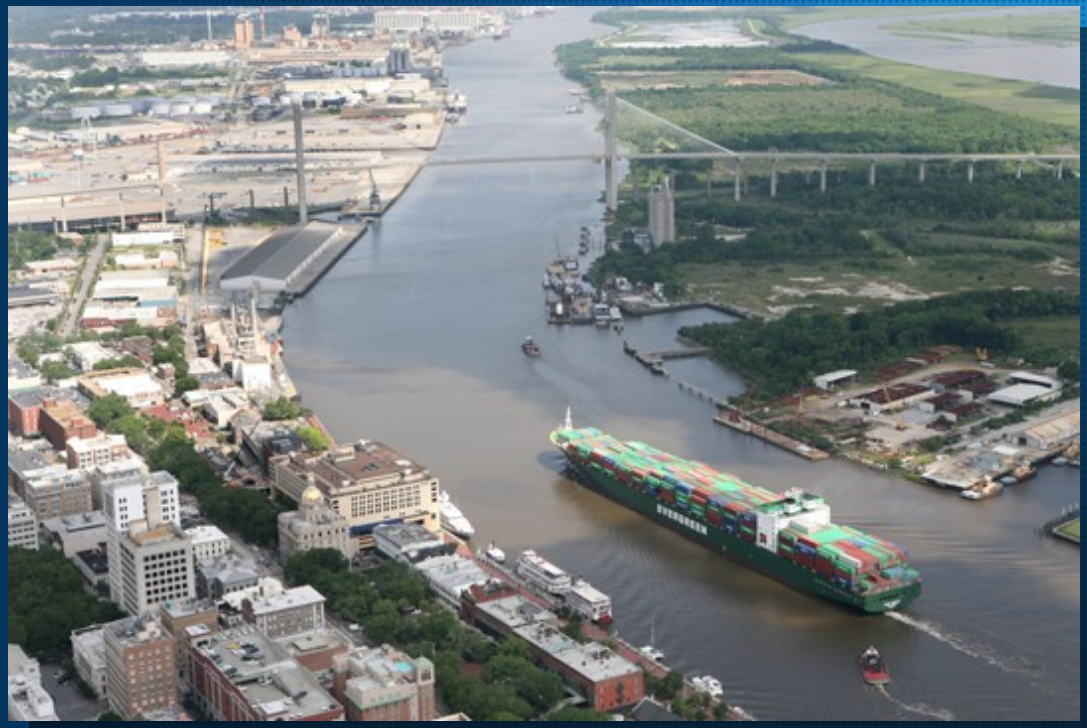
Planning Associates Course
Savannah Harbor Expansion Project



Hope Moorer
Georgia Ports Authority
May 19, 2011

The Economic Impact of Georgia's Deepwater Ports

Nationwide*

- In FY2010 the Port of Savannah moved 8.3% of total U.S. containerized trade and 18% of all U.S. East Coast containerized cargo.
- The GPA handled 11.9% of total U.S. containerized exports in FY2010.
- The Port of Savannah serves approximately 21,000 companies in all 50 states, 75% headquartered outside of Georgia.

Statewide**

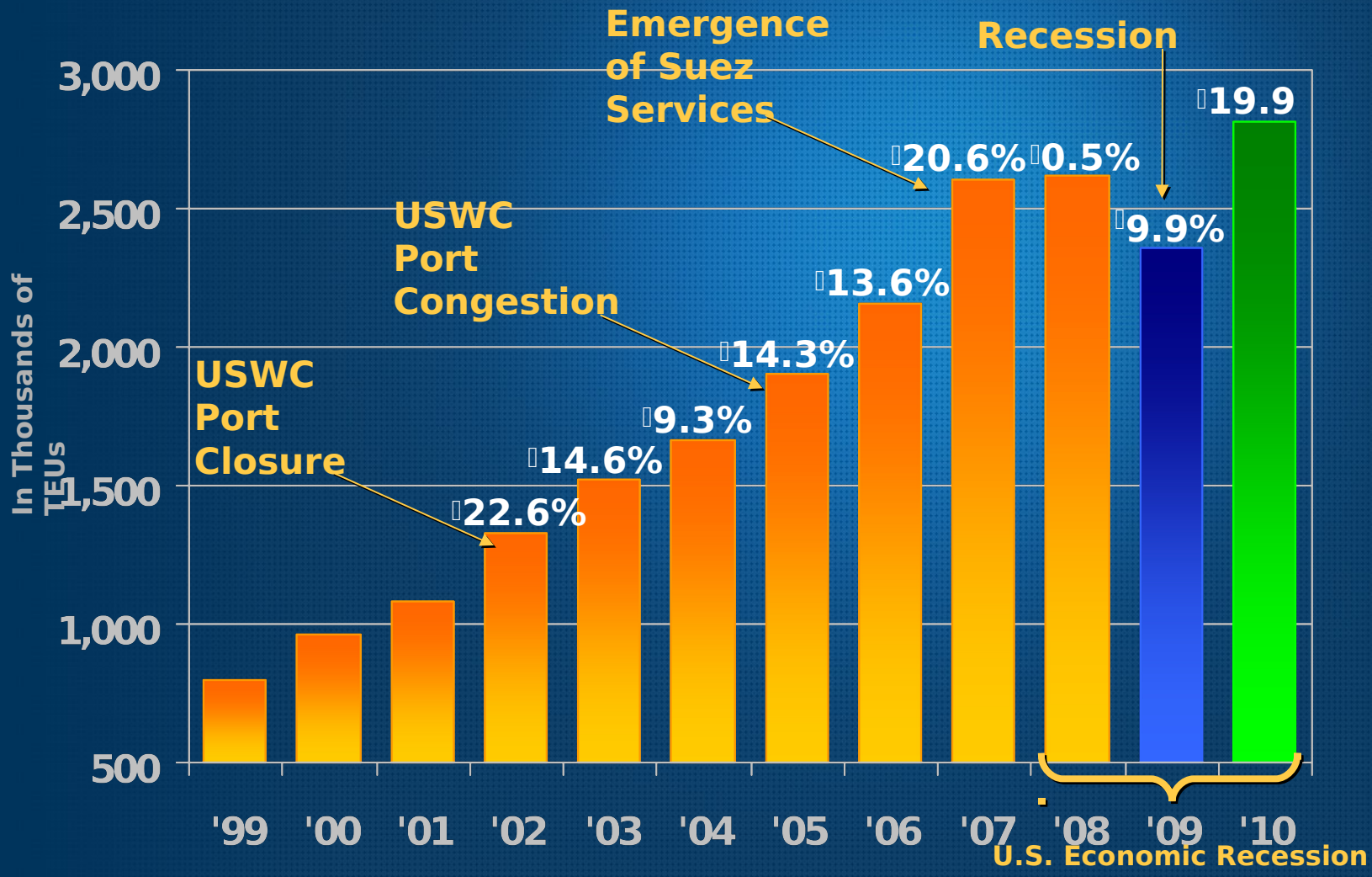
295,443 full- and part-time jobs*
(7% of Georgia's total employment)

- $61.7 billion in sales
- $26.8 billion in gross state product
- $15.5 billion in income
- $ 3.5 billion in federal taxes
- $ 1.5 billion in state taxes
- $ 1.1 billion in local taxes

* Source: U.S. Department of Commerce, based on tonnage
** Source: Terry College of Business, University of Georgia, FY2009

Port of Savannah Container Throughput

12-year History by Calendar Year



Source: GPA Marketing / EIS (loads & empties)

Top 10 U.S. Container Port Volume 2000 to 2010

(in 000 TEUs, loads & empties)

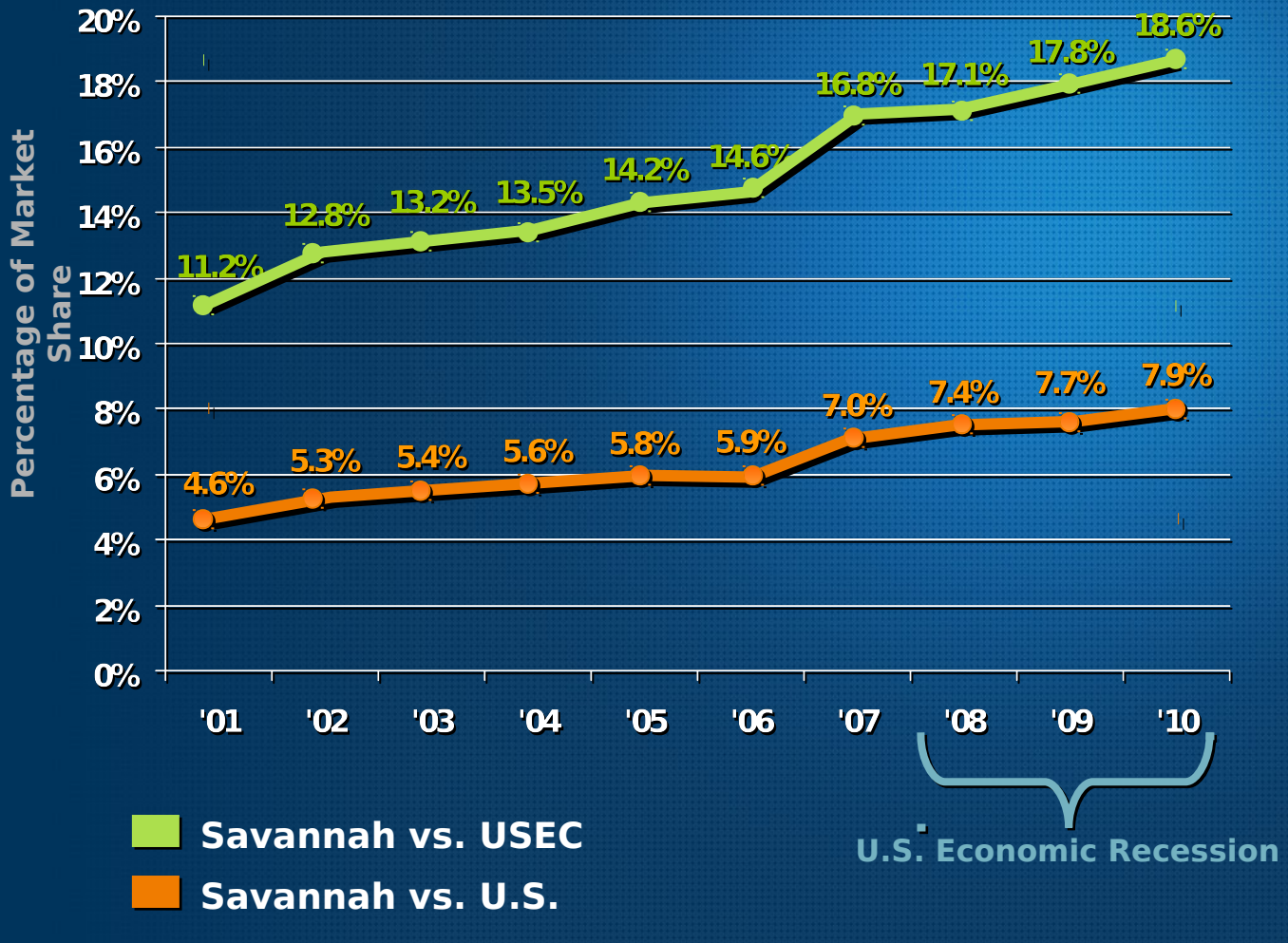
		2000	2010	10-Year CAGR	% Chg '09 vs '08	% Chg '10 vs '0
1.	Los Angeles	4,879	7,831	4.8%	-14%	16%
2.	Long Beach	4,600	6,263	3.1%	-22%	24%
3.	NY / NJ*	3,050	5,200	5.4%	-13%	14%
4.	Savannah	948	2,825	11.5%	-10%	20%
5.	Oakland	1,777	2,330	2.8%	-8%	14%
6.	Seattle	1,488	2,133	3.7%	-7%	35%
7.	Hampton Roads	1,347	1,895	3.4%	-16%	9%
8.	Houston	1,061	1,812	5.5%	flat	1%
9.	Tacoma	1,376	1,455	0.6%	-17%	-6%
10.	Charleston	1,632	1,364	-1.8%	-28%	

- In 2000, Savannah ranked as the 10th largest U.S. container port in volume.
- Savannah's share of the total East Coast trade with Asia is 48%, up from 22
- **Savannah is currently the shallowest of all major U.S. ports.**

*Projection – 2010, Source: AAPA

Port of Savannah Market Share

10-Year History by Fiscal Year



Savannah has gained market share for the past decade, which continued during the U.S. Economic Recession.

Source: PIERS – based on total loaded TEUs

Consistent Balanced Trade

Calendar Year 2010: A Record Year

Ten Year History

CY	Exports	Imports
2010	1,149,215	1,051,256
2009	1,026,802	883,554
2008	1,082,949	1,073,255
2007	1,074,028	1,005,375
2006	1,074,025	1,005,373
2005	866,220	782,445
2004	808,265	706,544
2003	679,212	679,212
2002	679,212	679,212
2001	679,212	679,212

CY10 Exports (52.2%) 1,149,215

CY10 Imports (47.8%) 1,051,256

Source: EIS / Loads only

Garden City Terminal's Top Export Commodities

Fiscal Year 2010

Top Five Exports by TEUs		
Rank	**Commodity**	**FY10**
1	Wood Pulp	175,653
2	Paper & Paperboard	158,372
3	Food*	129,635
4	Clay	99,919
5	Chemicals	65,331

Top Five Refrigerated Exports		
Rank	**Commodity**	**FY10**
1	Poultry (fresh & frozen)	59,813
2	Meat (fresh & frozen)	2,975
3	Oranges	1,796
4	Grapefruit & Lemons	966
5	Citrus Juices & Concentrates	467

*** Food includes refrigerated cargo and containerized agricultural products**

Source: PIERS

GPA, as 'owner & operator', provides flexibility & 24/7 cargo visibility.

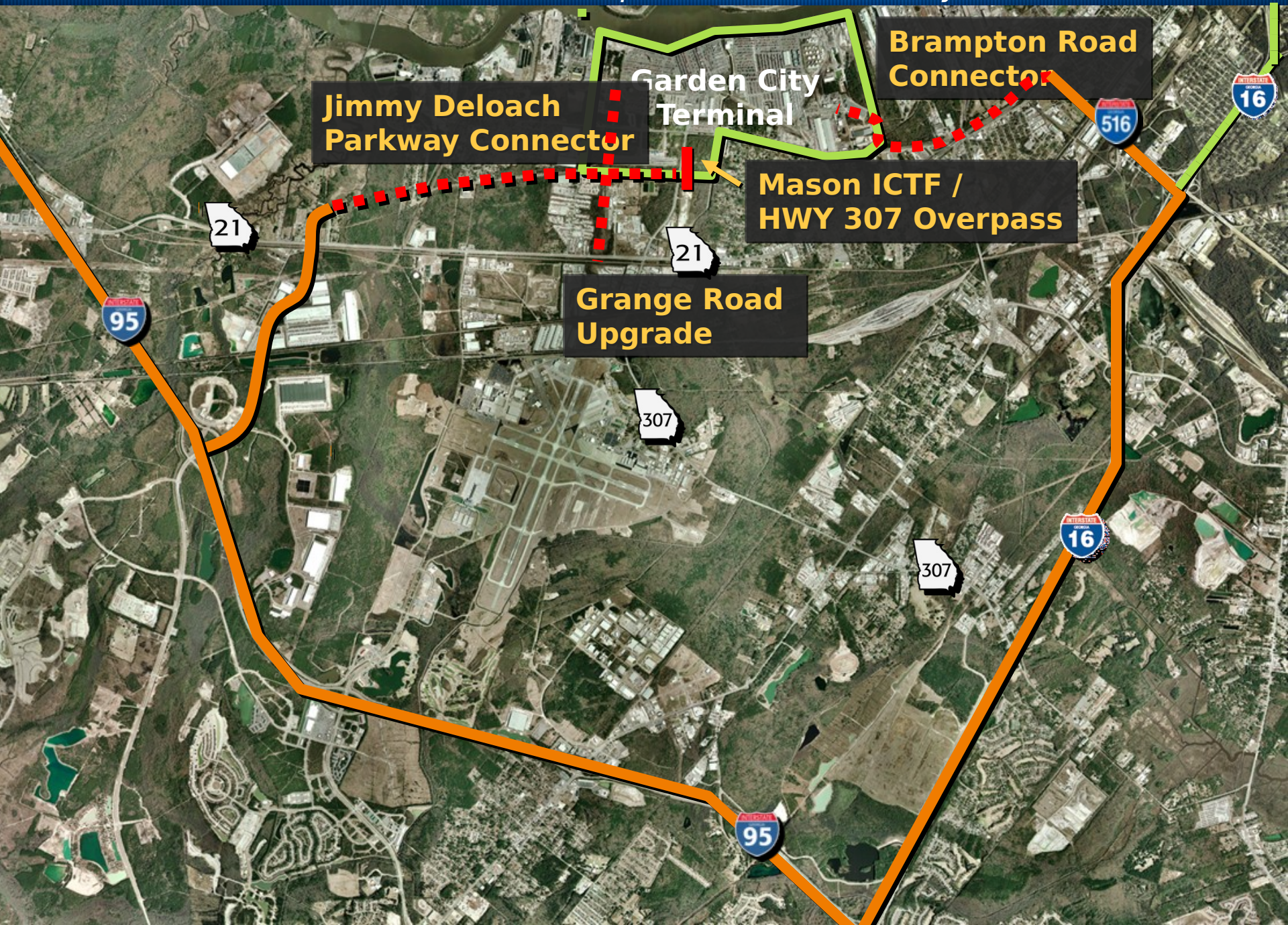
Source: GPA Engineering, April 2010

PORT OF SAVANNAH: "Tomorrow"

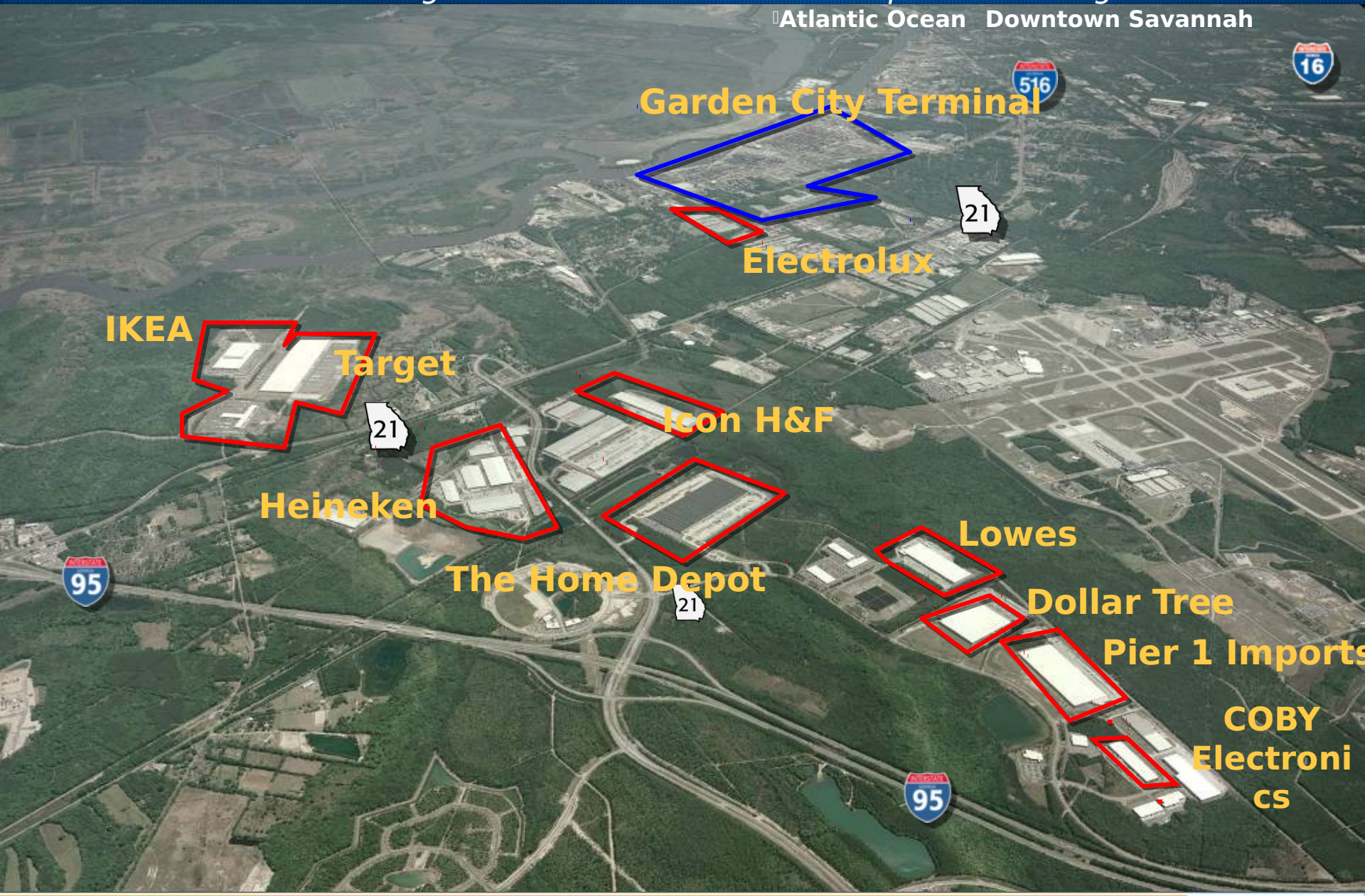
- Mason ICTF (Norfolk Southern Railroad)

- Chatham ICTF (CSX)

PORT OF SAVANNAH: Unmatched Transportation Connectivity



PORT OF SAVANNAH: Largest concentration of Retail Import DCs along the East Coast



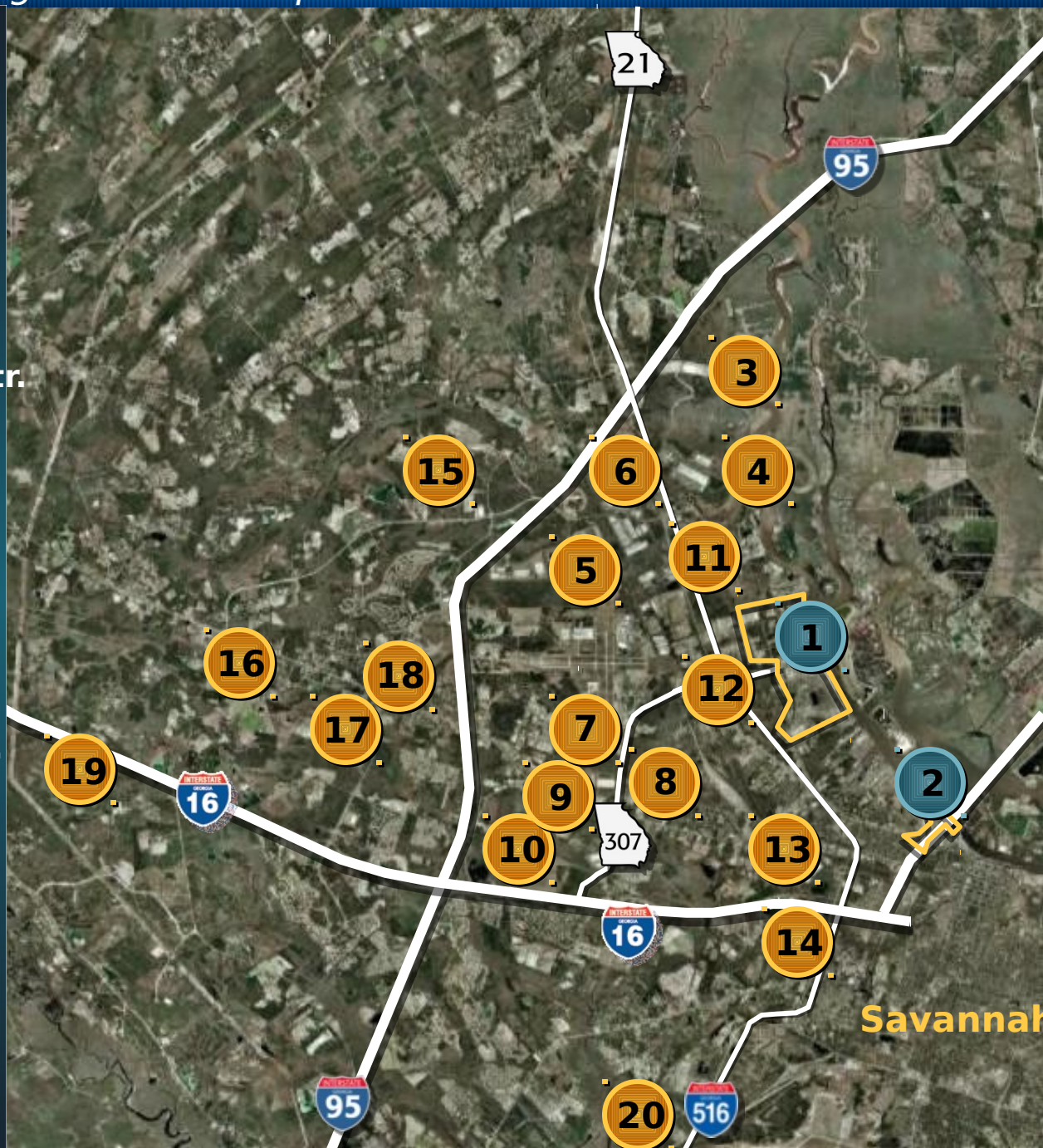
Redefining the pace of trade.

Georgia Ports Authority

PORT OF SAVANNAH: Existing Industrial Properties

1. Garden City Terminal
2. Ocean Terminal
3. NorthPort
4. Sav. River Int'l Trade Pk
5. Crossroads Business Ctr.
6. Crossroads Expansion
7. Dean Forest Business Ctr.
8. CenterPoint Intermodal Ctr.
9. LogistiPort
10. Mega Site
11. Crossgate
12. WestPort
13. Georgia Commerce Ctr.
14. Tremont Intermodal Ctr.
15. Tradeport Business Ctr.
16. AMB Morgan Business Ctr.
17. Morgan Industrial Site
18. Savannah Logistics Park
19. Newton Tract
20. Rockingham Farms

Not reflective of all Savannah-area developments.



43 Weekly Vessel Calls Covering All Major Trade

Savannah's Global Reach supports trade in 300-plus international ports (150-plus countries)

	Sav	-	USEC
Asia via Panama			15
Asia/India/Mid East via Suez	7		
North Europe	5		12

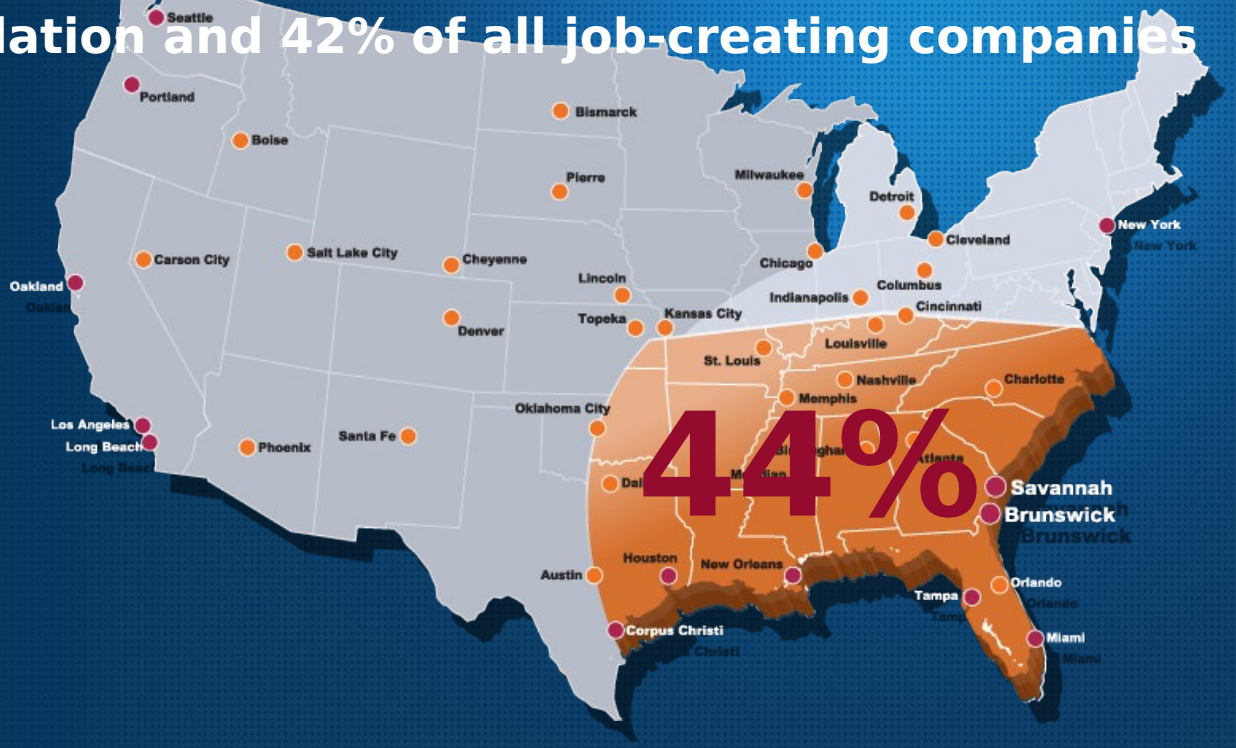
	Sav	-	USEC
Oceania	16		
	9	2	2
Mediterranean			5
		6	
Latin America			9
	1		18

Source: GPA Mktg. Last updated: Feb. 2011

Redefining the pace of trade.

Georgia Ports Authority

- **70% of U.S. consumers, or 215 million people, are east of a line drawn from Chicago to Dallas.**
- **70% of job-creating companies are also east of the same line.**
- **The Port of Savannah is most strategically located to reach 44% of the U.S. population and 42% of all job-creating companies**



Source: 2009 U.S. Census Estimates

Redefining the pace of trade.

Georgia Ports Authority

PROJECT HISTORY

Reconnaissance Study
1996

GPA completes Feasibility Study
1998

Chiefs Report **Oct 1999**

WRDA ’99 passes authorizing project
Dec 1999

GPA begins GRR and Tier II EIS
Dec 1999

GPA and Corps sign MOU **July 2001**

Project Authorized by Congress in WRDA 1999 conditioned upon following requirements:

- Additional scientific studies & completion of a General Reevaluation Report;
- Analysis of incremental depths from 42 to 48 feet;
- Approval not only by Secretary of the Army, but also by the Secretaries of Interior and Commerce and the Administrator of the EPA; and
- The establishment of the Stakeholders Evaluation Group to assist in the identification of studies, as well as the creation of a consensus mitigation plan.

Completed Tasks

- Biological Field Studies (wetland sampling & monitoring, fish studies)
- Geotechnical studies and physical characterization of materials
- Bank Stability Analysis
- Beach Erosion Study
- Coastal Erosion Additional Analysis
- Formulation of Alternatives
- Economic Analysis (fleet/commodity forecasts; multi-/region port anal)
- CSS Georgia Archival Research
- Dissolved Oxygen Impact Evaluation
- Floridan Aquifer Supplemental Analysis
- Sedimentation Analysis
- Sediment Quality Analysis & HTRW Screening
- Shortnose Sturgeon Study
- Temporal and Spatial Distribution Study
- Tidal Wetlands Study
- Hurricane Surge Screening
- Ship Wake Analysis
- Model Development and Acceptance
- Chloride Distribution Evaluation
- Impact Analysis

SAVANNAH HARBOR EXPANSION PROJECT: Map of Project Boundaries

Summary

1. The economic impact of Port of Savannah spreads throughout the nation.
2. Savannah is a critical port for the National Export Initiative.
3. Customer base unmatched on East Coast
4. Savannah has more space available than any other port on East Coast.
5. Road and rail connections are in place.
6. The nation needs to prepare its infrastructure for the shift in trade at completion of the Panama Canal
7. The Port of Savannah services 44% of the U.S. population.
8. Savannah is the 4th busies[illegible] fastest growing port in t[illegible] yet it is has the shallow[illegible]

Preparing the Face of Trade

Georgia Ports Authority